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DSSD CENSUS 2000 PROCEDURES AND OPERATIONS MEMORANDUM SERIES #EE-2

MEMORANDUM FOR	Michael J. Longini Chief, Decennial Systems and Contracts Management Office
From:	Howard Hogan Chief, Decennial Statistical Studies Division
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Subject:	Trip Report for the Observation of the Phoenix Data Capture Center and a Telephone Questionnaire Assistance Inbound Call Center in Phoenix, Arizona

Observation of Data Capture Center

On Monday, March 20, I visited the Data Capture Center (DCC) in Phoenix, Arizona. My main reason for going was so that I could get a clearer idea of the processes that occur at the DCC. However, I was also interested to see how the DCC functions when the workload is very large.

Upon my arrival in the morning, a Site Representative gave me a tour of the facility. At the completion of the tour, I was given access to several parts of the building so that I could look more closely at specific operations. I mostly chose to observe a lot of the sorting, scanning, and Key From Image (KFI), but was also able to watch most other areas for at least a brief amount of time.

In watching the sorting, I found that all eight machine sorters on the floor were running for the majority of the time that I was there. Most of the machines seemed to be working correctly with envelopes jamming only occasionally. However, at one point, there was a sorter that was jamming about every minute or two while it was running. It was found that a belt somewhere in the middle of the machine, and not within plain view, was broken. Once this was discovered, the belt was replaced and the problem was logged into a binder. When the sorter began running again, the jamming problem appeared to be resolved.

While observing the scanning, I noticed that there were at least a couple of scanners double feeding pages. The operator of one of the scanners noted that these "double feeds" seemed to occur most often on the back two pages of the long form. When this would occur, the operator would stop the machine and quickly look through the pile of scanned forms to figure out which

page had been skipped. He would then put this page, along with any following pages that had also been scanned, back into the bin to be passed through the scanner again. Next, he would help the forms through the scanner by jogging the pages slowly until he felt that it was ready to work at normal speed again.

In watching the KFI process, several images appeared to show a very legible response written by the respondent and it was not clear to me why these required intervention. Overall, I was very impressed by the keyers for this operation. They worked very quickly and did a good job of keying the responses as they appeared in the image on the screen.

Although I was able to observe other areas in the DCC, my time was limited. However, I noticed that a Postal Service driver was physically in the building. He was standing near the truck with a clipboard keeping track of how many trays of forms were being unloaded. In a previous trip to a DCC, I was given the perception that Postal Service representatives had a specified waiting area where they were supposed to stay while the forms were being unloaded to assure confidentiality.

Observation of Telephone Questionnaire Assistance Operation

On Tuesday, March 21 and Wednesday, March 22, I observed Telephone Questionnaire Assistance (TQA) at a contractor called Research Resources in Phoenix, Arizona. I found the observation to be very interesting and beneficial. When I arrived, I received a tour of the facility and also met many of the full time employees involved with this Census operation. I was shown how the building was divided into census-related and non-census-related activity areas. It was obvious that steps were taken to ensure that employees working with Title 13 data on the TQA operation were distinguished from the company's standard workforce.

In my time there, I was informed that the call volume was relatively high because reminder cards asking people to send in their census forms had been delivered in the day or two prior to my visit. On the Tuesday that I visited, the center had received about 12,500 calls - 8000 of those were English calls and 4500 were Spanish calls. A majority of the phone calls that I monitored with a Quality Assurance Representative (QAR) supervisor were requests by callers to have a census form sent to their residence. Most of these callers said that they had received a reminder card in the mail but had never received their census form. In one case, the caller told the agent that he had received a short form in the mail, filled it out, sent it in, and then made a photocopy for himself as proof that he had completed the form. The man then realized days later, after looking at his photocopy, that the address on the form was incorrect and that he had filled out his neighbor's form (e.g., the man lives at 123 Main Street but filled out the form for 125 Main Street). After talking to the agent for a few minutes and not being satisfied with the answer he was given (the agent told him that he did not need to do anything), the caller asked to talk to a supervisor. The supervisor then talked to the caller for another few minutes and finally decided that it would be best to take his address information and have another census form sent to his residence. This solution has potential for multiple responses by the caller's household, but it seemed to satisfy the respondent.

I also sat in on a remote client monitor call by a representative from Electronic Data Systems (EDS). This representative listened to several calls by different agents for a period of one hour. During this session, there was a QAR supervisor, an agent supervisor, and one supervisor of the overall TQA project in the room also listening in on the phone calls. When the EDS representative would have a question, one of these three supervisors would try to answer it. The purpose of the client monitor call was for EDS to get an idea of how calls are being handled in each call center.

On Wednesday, I was able to sit in on several monitoring sessions by a QAR. These sessions were quality checks within the call center to make sure that the agents were using proper presentation and call management skills. Each agent was to be monitored three times each day. The QAR would pick an agent from a list that they were given, monitor the agent's next call both over the phone and on a remote computer screen from beginning to end, and then grade them on how well they performed by filling in a photocopied rating sheet. Afterward, the QAR would pull the agent from their phone station and bring them into a private office to let them know how they did. In addition, the agent would receive a copy of the rating sheet that the QAR filled out. Most agents were relatively receptive to the comments and suggestions made by the QAR, but there were also some that tried to produce reasons on why unsatisfactory issues happened. (Normally, the AutoFocus system is used for these monitoring sessions. However, this system was down during the day that I was observing.)

Attachment

cc:
DSSD Census 2000 Procedures and Operations Memorandum Series Distribution List
R. Harris   FLD

INBOUND TQA GENERAL PRODUCTION CHECKLIST OF CENTER
ACCOUNTABILITIES AND PERFORMANCE MEASUREMENTS

CENTER _RESEARCH RESOURCES - PHOENIX, AZ_

DATE _03/21/00 - 03/22/00_

OBSERVER _KEVIN J. ZAJAC_

Center Accountabilities/ Performance Standard	Meets Standard	Does Not Meet Standard	Comments
Auto Focus Scan Forms are always completed by QA Reps when monitoring agents.			SCAN FORMS / AUTO FOCUS WERE NOT BEING USED AT THE TIME BECAUSE OF TECHNICAL DIFFICULT. QA REPS WERE INSTEAD USING PHOTO COPIED FORMS TO EVALUATE AGENTS. (N
Agents and their supervisors are consistently given feedback by QA Reps after monitoring sessions.	✓		QA REPS WERE OBSERVING THE SCREEN AL BUT I DON'T BELIEVE IT WAS W/ AUTO FOCU
Calibration sessions are held by QAR Supervisors for all QA Reps.			DID NOT OBSERVE A SESSION, ALTHOUGH I WAS TOLD THAT THE WERE HELD WEEKLY.
Agents use OSS to enter data for form requests.	✓		
Agents use OSS to complete survey forms.	✓		
Agents use OSS to answer caller questions.	✓		
Bi-lingual agents are proficient in English as well as the 2nd language.	✓		THE COUPLE OF BI-LINGUAL AGENTS I SPOKE W/ WERE BOTH FLUENT IN ENGLISH.
Agents and other staff that have access to Title 13 data are all sworn in.			DID NOT OBSERVE SWEARING IN, ALTHOUGH THEY HAVE A PERSON WHO IS RESPONSIBL FOR ENSURING ALL STAFF ARE SWORN IN.

Center Accountabilities/ Performance Standard	Meets Standard	Does Not Meet Standard	Comments
Supervisors are observed to be actively assisting agents, conducting at-station call observations, answering questions and handling escalated calls when necessary.	✓		
EDS scheduling spreadsheet is used for QA monitoring schedules, tracking performance scores, agent classifications and agent status reporting.			N/A
Center management is knowledgeable about TQA requirements and facilitates observer.	✓		